



Waltham Forest

**SOCIAL VALUE ANNUAL
STATEMENT
2024**

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Approach and Intentions in Relation to Social Value

Social Value refers to the wider financial and nonfinancial value created by an organisation through its day-to-day activities in terms of the wellbeing of individuals and communities, social capital created and the environment.

The Council is committed to a performance and evidence-based approach to Social Value. The purpose of social value is to deliver tangible community benefits above and beyond the basic contract terms for external contractual spend and to secure additional social benefits in line with the Council's identified priorities.

The Council's Social Value objectives have been developed to support the vision, priorities, and actions of The Council's new strategy Mission Waltham Forest.

At the heart of Mission Waltham Forest is our vision for the borough:

A more equal borough, where everyone can make the most of their strengths to live the life they want to lead.

The Council has adopted the following definition of Social Value, as developed by the Sustainable Procurement Task Force:

'A process whereby organisations meet their needs for goods, services, works and utilities in a way that achieves value for money on a whole life basis in terms of generating benefits not only to the organisation, but also to society and the economy, whilst minimising damage to the environment'

Approach and Intentions in Relation to Social Value

In December 2020, the Council established a dedicated Social Value function within the Return on Investment (ROI) umbrella; to drive additional value for every pound the Council spends with third party suppliers and unlocks genuine benefits for our communities, residents and environment.

Over the past four years London Borough of Waltham Forest (LBWF) has transformed the way in which it maximises the social impact from its contracts for services, regeneration, and construction works.

This collaborative journey with its diverse supply chain has been marked by ongoing learning, continuous improvement, and the meticulous measurement of value-add contributions from its supply chain partners.

Themed under the three pillars of sustainability - Social, Economic, and Environmental - LBWF has strategically planned and measured its actions to contribute to the long-term well-being and resilience of individuals, residents, businesses, and the environment.

This statement showcases the Council remarkable social value journey, highlighting the seamless integration of social value across all services and showcasing a powerful social narrative achieved for our diverse communities.

1. Demonstrable and Quantifiable Success
2. Partnership Working
3. Our Environmental, Social, and Governance (ESG) Approach
4. Smarter Thinking

Key Areas of Focus

The social value approach and key areas of focus have been identified using new Corporate Strategy as a baseline and aligned with the Council's vision, missions and key principles.

Mission Waltham Forest is the Council's new plan to tackle the housing crisis, reduce fear of crime and provide the outstanding experience our residents and communities deserve. Mission Waltham Forest sets out the Council's plan for a more equal borough by 2030. It is the Council commitment to all our residents to tackle the fundamental challenges facing them and drive the change within the Council that is needed to achieve this.

The Council vision is organised around core set of Missions for the change we want for our communities and the change we need to make as a Council. Our Missions are designed as challenges for ourselves as an organisation and serve as our commitments to our residents.

Mission Waltham Forest is a testament to our unwavering dedication to putting residents at the heart of everything we do. It signals our relentless focus on equality and opportunity for everyone. and enables people to have a say in shaping the future of their Borough and allows the Council to respond to residents' needs through bold, tailored interventions. This will provide the foundation for long-lasting change in Waltham Forest, helping create a fairer borough where every resident can thrive.

Key Areas of Focus

The Waltham Forest Council is committed to building a more inclusive, sustainable, and fair future through social value. We have set ambitious goals to address various issues such as equal opportunities, the housing crisis, net zero emissions, and creating a safe and green community.

To ensure our vision priorities are centered around the communities with Waltham Forest, the Social Value Service aligns the Council's priority borough missions with the United Nations' Sustainable Development Goals (UNSDG).

We have also utilised National Themes, Outcomes, and Measures (TOMs) to evaluate the social and local economic benefits delivered in local authority contracts.

Strategy Alignment with the Sustainable Development Goals (SDG)

Waltham Forest's goals align closely with the United Nations' Sustainable Development Goals (SDGs), providing a framework for addressing social, environmental, and economic challenges.

Integrating SDG principles into our strategy, the council aims to positively impact locally and globally.

SUSTAINABLE DEVELOPMENT GOALS



Measuring and Delivering Social Value



The London Borough of Waltham Forest has successfully implemented the TOMs framework to monitor and report the effects of procured goods and services, ensuring accountability and transparency in delivering social value to the community.

Extending this process to internal initiatives will help understand the additional benefits of council programmes for residents and communities.



Key Areas of Focus

WALTHAM FOREST MISSIONS

- 1 Ensure every family and every child are given every opportunity**
We will ensure every family, and every child can access the services and support they need so all children can thrive
- 2 Build an economy that works for everyone**
We will shape a more inclusive local economy that attracts businesses and talent while unlocking opportunities for residents
- 3 Make Waltham Forest a great place to live and age well**
We will ensure all residents can make the most of their strengths and live healthier, longer, and more independent lives.
- 4 Tackle the housing crisis head on**
We will deliver a new generation of homes that are affordable to buy and affordable to live in.
- 5 Lead the way for a net-zero borough**
We will tackle the Climate Emergency head on, paving the way for net zero in Waltham Forest.
- 6 Safe, green neighbourhoods where everyone can thrive**
We will ensure every resident feels safe in their homes and neighbourhoods and feels included and welcome.

SOCIAL VALUE MISSIONS

Empower families with knowledge and skills through Apprenticeships, Educational Workshops, Training Sessions, all available as Social Value commitments from our suppliers.

Support local entrepreneurs and SMEs through provision of expert business advice to VCSEs and SMEs, investing in education and infrastructure, and incentivising socially responsible business practices.

Providing tailored support and resources to empower individuals, prioritise preventive measures, promote community engagement, and facilitate access to training, employment, and social amenities.

Encourage suppliers to engage with communities to understand their needs, ensuring housing solutions are inclusive and support long-term affordability and well-being, focusing on accessibility and sustainability.

Promote renewable energy, improving energy efficiency in buildings and incentivising low-carbon transportation. Reduce emissions associated with transportation and waste by utilising local supply chain spend, local sourcing and circular economy. Encourage reuse and recycling.

Consider crime prevention and community safety across all we do, providing targeted support to address the risk factors and impact of crime while making physical changes to the built environment so that all our residents feel supported, safe and empowered to thrive in their homes and neighbourhoods.

Social Value continues to align with the Council corporate priorities, ensuring that outputs are bespoke with hyperlocal approach, interventions that are co-designed with communities generates positive impact and delivers tangible and meaningful outcomes.

Key Areas of Focus

Ensuring Every Family and Every Child is Given Every Opportunity



SDG 1 (No Poverty): Implement social protection systems and measures for all, ensuring that the vulnerable families and children in the borough are supported.

SDG 4 (Quality Education): Improve the quality of education and promote lifelong learning opportunities for all children in the borough.

Building an Economy That Works for Everyone



SDG 8 (Decent Work and Economic Growth): Promote an inclusive and sustainable economy that benefits everyone and provides complete and productive employment.

SDG 10 (Reduced Inequalities): To reduce income inequalities, implement policies for the income growth of the bottom 40% of the population at a rate higher than the borough average.

Making Waltham Forest a Great Place to Live and Age Well



SDG 3 (Good Health and Well-being): Improve healthcare facilities and promote healthy lifestyles to promote well-being for all ages.

SDG 11 (Sustainable Cities and Communities): Improve public spaces, transportation, and housing to make the borough inclusive, safe, resilient, and sustainable.

Tackling the Housing Crisis Head-On



SDG 11 (Sustainable Cities and Communities): Ensure access for all to adequate, safe, and affordable housing and basic services.

Leading the Way for a Net-Zero Borough



SDG 7 (Affordable and Clean Energy): Increase the share of renewable energy in the borough's energy mix and improve energy efficiency.

SDG 13 (Climate Action): Implement measures to combat climate change and its impacts by regulating emissions and promoting developments in renewable energy.

Safe, Green Neighbourhoods Where Everyone Can Thrive



SDG 3 (Good Health and Well-being): Enhancing access to green spaces which contribute to mental and physical health.

SDG 16 (Peace, Justice and Strong Institutions): Promote peaceful and inclusive communities for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels.

Internal Engagement, Communication and Management of Social Value

Social value is clearly defined in the Council's procurement rules and social value considerations are taken into account in all exercises above the Public Contracts Regulations (PCR) threshold, with social value criteria included in tender documentation and contracts. The Council also has taken a lead amongst other local authorities by implementing robust contract management processes in place for monitoring/implementation to ensure that commitments are adhered to, in the same way that Quality and Cost could also be considered.

Waltham Forest has developed a Social Value Policy, which sets out the Council's approach to social value, based on the nationally recognised "TOMs" framework ("Themes, Outcomes, Measures"), which encompasses a comprehensive range of outcomes, and provides an objective means of quantifying the actual value of each outcome.

When inviting bids for contracts above PCR thresholds, it is mandatory that a minimum of 10% of the evaluation weighting is allocated to social value. The Council requires bidders to submit the social value element of their tender submissions via the online Social Value Portal. To do this, bidders must register for free with the Social Value Portal.

Targets and actions relating to sustainability (and other social value objectives) are a mandatory requirement in Strategic Commissioning Board (SCB) business cases. SCB is a senior officer panel that convenes monthly to peer review procurement business cases and contract management activities for goods and services contracts with a value exceeding the PCR threshold (Currently £214k) and for works contracts with a value exceeding £1m). Within these business cases objectives and actions on the Benefits and Resilience related to Social Value are included. These are identified under Social Impacts, local and regional Economic impact, and support of corporate priorities for each contract issued.

For all procurement processes relating to contracts for goods, services or works worth more than £1m, it is also a requirement that these business cases are scrutinised and approved by the Council's Cabinet (or, at a minimum, a Cabinet member).

In Waltham Forest, officers with procurement responsibilities also receive training on Social Value which is in line with the Social Value Policy.

Internal Engagement, Communication and Management of Social Value

Social Value roles and responsibilities are distributed as follow

Social Value sits under the Strategic Director of Resources and reports directly to Corporate Director of Return on Investment.

Head of Social Value and Social Return on Investment

- leads on Social Value strategy
- oversees the Social Value delivery across the Council
- reports on the Social Value Strategy implementation and delivery

Social Value Lead

- leads on social investment fund
- leads on commercial partnership development and engagement strategy
- manages funding and grants
- ensures the social investments opportunities

Social Value Impact Monitoring Manager

- leads on quality assurance, data compliance and regular reports
- leads on impact monitoring of all contracts
- ensures all procurement templates and documentation (Instruction to Tenderers - ITTs, Contracts, Supplier Guidance, Contract Standing Orders) are updated

Contracts Managers

- monitor Social Value delivery through their contracts
- apply remedies in case of non-delivery

Implementation Approach for Embedding Social Value

Social Value is considered at all phases of the contract lifecycle, from initial introduction of the business case through commissioning and procurement to contract management. It is introduced at the design phase to initiate conversation and guide the Council in what could be achieved where there is an expectation to maximise what could be realised.

During the commissioning phase a detailed approach is determined and approved through the Council's Gateway approval process and Cabinet approval processes where required. When social value is not to be included in an activity, either due to proportionality or appropriateness, or where the mandatory 10% weighted criterion is to be amended, this is documented, challenged and passed through the appropriate governance processes linked to the activity.

The procurement phase produces a response from the market and social value evaluated based on quality and quantity against the mandated 10% weighted criterion. Where the Council maintains or supports a wholly owned company or joint venture opportunities there is an expectation that this arrangement continues to follow the Council's approach to maximise social value. This ensures consistency with the surrounding market and feeds into the priorities identified and delivered through the Council services.

The Social Value in the Council is measured and reported through the Social Value Portal for consistency and transparency, using dedicated Council measures called Waltham Forest TOMs (Themes, Outcomes & Measures). Social Value is measured as the actual activity being created e.g. jobs, apprenticeships etc plus also the economic impact in GBP to an area of these activities.

Implementation Approach for Embedding Social Value

The Council's intention is to ensure that our supply chain contributes as much as possible to the overall wellbeing of our residents and we therefore include Social Value as part of the procurement process. When tendering to supply goods, services or works potential suppliers are required to provide details and evidence of how they meet the Council's corporate priorities. All suppliers are required to define target outcomes they will achieve across the lifetime of the project and submit a Social Value Method Statement detailing how they will achieve those targets. This approach allows the Council to contract manage the Social Value element efficiently and monitor the outcomes for the duration of the contract, but without setting social value targets, which would then become a costed item within the specification rather than a unique value add that a provider can give.

Throughout the contract management phase social value is monitored and enforced against the contractual commitments devised during award via dedicated contract managers. Contract managers are required to report social value delivery centrally to champion Council wide success and scrutiny.

Internal Support Available to Achieve Targets and Ambitions

Social Value links into the Council's corporate priorities and all workstreams have an element of generating social, economic, and environmental impact within the borough. Educating officers is key to having ambassadors and champions that can advocate for Social Value. Educating internally will ensure a stronger presence of Social Value within the council and a greater impact on the delivery of contracts across different workstreams. We ensure that all staff have access to the Social Value Policy as well as the TOMs framework so that they are aware on how the council defines Social Value and how it is captured through our contracts.

The Waltham Forest Social Value Measures (WF TOMs) are comprised of two lists, the Master TOMs – that contains 52 measures and the Golden TOMs which is a streamlined version of the Master list and comprise 21 measures. Both sets of WF TOMs have been specifically designed to align to the council's corporate objectives and are used this for Social Value reporting. The Council has worked closely with Social Value Portal to create the TOMs framework for the borough. Staff will be able to understand how to embed Social Value within their contracts and they will receive recommendations from the SV team according to our tiered approach. The Step-by-step guide included in the SV toolkit will help to train staff on how Social Value is embedded at different stages in the procurement process.

The Council staff will be equipped with the following to ensure that they are fully trained on Social Value:

SV Toolkit

The Council Social Value Toolkit equips staff with the knowledge on our tiered approach to embedding Social Value on contracts. It also helps staff to understand how Social Value is included from early stages of project design and business case formation, through procurement and finally onto contract implementation. The Social Value Toolkit also includes the Social Value Fund process that covers the cash donations and in-kind contributions made by the suppliers. The distinction between Social Value and section 106 included in the toolkit provides clear explanation the council's approach to creation of community benefits for and provides clear direction to maximise the positive impact generated under the three pillars of socially, economically, and environmentally.

Internal Support Available to Achieve Targets and Ambitions

Market Engagement and Suppliers Training

The Council has established a Supplier Improvement Function which sits in the Procurement team. The ultimate aim of this function is to equip Contract Managers and Project Directors with necessary social value knowledge that will substantially increase the quality of contract delivery. The training consists of two modules and covers social value introduction, the Council approach, measurement, and impact monitoring as well as progress reporting of relevant outcomes at all stages of the project cycle.

Collaboration with Internal Teams

The Council Social Value Team have established strong connections with internal services and departments to enhance the collaborative working and raise wider awareness on Social Value and the ambitions to push the agenda throughout the borough. Regular meetings are scheduled in with the Council's Procurement, Employment, Business & Skills and Planning teams. These meetings help to keep a dialogue on both workstreams and how to best collaborate to increase the positive impact on our internal projects and contracts within the borough.

Social Value Portal is our single reporting framework, and we demonstrate its effectiveness to relevant staff members by providing some members with access to view the progress. Technology is at an efficient standard within the SV workstream, and the above methods prove to be successful in raising awareness on the impact that Social Value is generating on our projects along with the good news stories of the positive benefits that social impact brings to the borough.

Collaboration, External Engagement and Support Available to Partners That Want to Contribute to Creating Place Based Social Value

The Social Value Team at the Council is fully committed to ensure our suppliers are supported throughout the lifetime of their contracts. Our WF TOMs framework measures both financial and non-financial outcomes and all suppliers are provided with detailed instruction and supplementary guidance provided at the tender stage.

Pre-delivery inception meetings are arranged with awarded suppliers, as a steppingstone towards development of mutually beneficial partnerships.

Supplier relationship management is vital, and we engage with all suppliers on a regular basis. Our function organises an onboarding meeting and once projects are more established, we build up a support network internally to connect the suppliers with [each other and the wider community]. Our suppliers are our valued partners, and we work with them in collaborative way to ensure meaningful support is provided through internal and external networks.

The Council holds quarterly developers' forums with all major construction organisations. The forum is chaired by our developers and provides opportunity for sharing best practice, discuss challenges and identify and implements improvements. We have built a strong cohesion between section 106 and Social Value to clearly portray both avenues to our developers so that they can maximise the social, economic, and environmental outputs and outcomes on their respective projects.

Commitments made by suppliers are reported on via the Social Value Portal –, our suppliers receive appropriate support to ensure that they can navigate through the system to upload their delivery on a timely basis. Regular dialogue is kept by building and maintaining the strategic partnerships with the suppliers to ensure the interventions are bespoke and based on community priorities and needs.

Collaboration, External Engagement and Support Available to Partners That Want to Contribute to Creating Place Based Social Value

Suppliers are briefed by the Council and Social Value Portal on evidence requirements at monthly supplier engagement sessions and meetings with Social Value team. Evidence of social value delivery is verified by the Social Value Portal. Further verification can be requested by the Council if the evidence provided isn't sufficient or requires additional clarification.

Social Value Progress Reports for the Cabinet Members and Senior Leadership Team are designed and produced on quarterly basis. They provide up to date information, highlights and achievement for the Social Value progress on all contracts. An annual report that comprised of comprehensive information and features case studies and good news stories is created at the end of each financial year. Going forward the annual report will be developed and presented to Members and Senior Leadership Team alongside the Council's financial report.

Performance Management

Social value is measured in both financial and non-financial terms using The Council dedicated Waltham Forest TOMs Framework and commitments made by suppliers are reported on and monitored during the implementation of contracts. The delivery of social value that is committed is tracked at varying levels within the Council, at contract level via contract managers where suppliers provide evidence that is scrutinised, at departmental level via reporting centrally where challenges are undergone against what is provided and organisationally via quarterly member and management boards alongside advertising success to the public.

To demonstrate the wider impact of the Council's investment programmes, as well as to support future decisions, the Council developed priority impact measures to assess outputs and return on investment from its Capital Portfolio and are published in the annual Capital Strategy. These measures are linked to the Waltham Forest TOMs and include delivery of physical outputs as well as employment and skills outcomes for local people, such as construction jobs, apprenticeships, and work experience placements.

The priority impact measures are regularly monitored across the capital investment portfolio, by collating project/programme-level data on physical benefits, together with information captured on the Social Value Portal and monitoring information on Developers Contributions agreed through the Planning process (i.e., s106 agreements).

Climate Emergency Action Plan and developing strategy, as well as expanding on the established metrics to further capture the impact of our investment on residents, communities, and businesses. This approach has the potential to significantly increase the benefits we deliver in the coming years, developed through our 15-minute Neighbourhood model and pilots

Achievements and Benefits Realisation

To demonstrate the wider impact of the Council's dedication to social value, as well as to support future decision making around the prioritisation of resources, we have developed a Total Return on Investment Framework. Project-level data on the physical benefits that will be delivered, together with information from the Council's suppliers recorded on the Social Value Portal, and monitoring information on Developers Contributions agreed through the Planning process (i.e., CIL agreements) providing a single holistic view of the significant expected outcomes across our £533 million delivery portfolio.

This framework builds on the Council's Social Value Policy 2021–2025, which sets out how the Council maximises added value for money through its purchasing of goods and services to generate benefits 'not only to the organisation, but also to society and the economy, whilst minimising damage to the environment.' The Social Value Policy highlights the three key areas of focus for the Council – or 'Golden TOMs' – based on the National TOMs (Themes, Outcomes and Measures) Framework.

The priority impact measures are regularly monitored across the capital investment portfolio, by collating project/programme-level data on physical benefits, together with information captured on the Social Value Portal and monitoring information on Developers Contributions agreed through the Planning process (i.e., S106 agreements).

The Total ROI monitoring data is reported on a quarterly basis to the Councils Capital Strategy and Asset Management Group (CSAMG); a senior officer-led decision-making body, which is co-chaired by the Director of Finance and Strategic Director for Economic Growth and Housing Delivery. It is also reported annually through the LBWF Capital Investment Strategy - the key document demonstrating both the impact of the Council's investment during the previous year and our plans and forecast impact for the next five years.

Data captured on the Social Value Portal relating to our capital investment programmes is regularly reported at project/programme boards and to the Infrastructure & Investment Board (IIB), chaired by the Leader of the Council. This demonstrates the organisation's commitment to monitoring Social Value outcomes.

Achievements and Benefits Realisation

The innovative approach has demonstrated the significant benefits delivered in 2022/23 and captures the projected long-term impact of our work, which will be truly transformative for Waltham Forest and our communities:

CONNECTING PEOPLE WITH OPPORTUNITIES	LEADING THE WAY FOR A NET ZERO BOROUGH	AN ECONOMY THAT WORKS FOR ALL	SAFE AND GREEN NEIGHBOURHOODS
LOCAL EMPLOYMENT 765 SUSTAINABLE JOBS	CAR MILES SAVED 8,300	LOCAL SPEND CIRCA £12,000,000	VOLUNTEER HOURS 6780 HOURS
100 APPRENTICESHIPS (FTA)	WASTE REDUCTION 7,279 TONNES	EXPERT BUSINESS HOURS 6,870 HOURS	VCSE SPEND £119,900
WORK EXPERIENCE 953 WEEKS	CARBON REDUCTION 380 TCO2E	EDUCATIONAL SESSIONS 1,340 HOURS	COMMUNITY SUPPORT £831,100

Actions and Next Steps for Delivery

The Council continues to work closely with our current development partners and contractors on innovative solutions to maximise Social Value delivery through our investment programmes.

The redefined social value approach will provide a comprehensive profile of the actions, deliverables, resources, and timescales to achieve the ambitions outlined in this statement as well as the social value benefits have been realised for that period.

Regular reports with progress update will be developed on quarterly basis and distributed to all key partners and strategic stakeholders.

We will continue to ensure that all our suppliers consider and maximise social value and create initiatives to positively impact our communities in which we serve, both during the course of the commissioning & delivery phase.

Building on the new Mission Waltham Forest strategy, we will ensure that social value approach is fully aligned with its core aims. We will work with our suppliers to maximise social value interventions that are genuine and meaningful, based on our residents' priorities, shaped around our communities needs and deliver the desired, positive impact that benefits all in the Borough.